



Filing ID #10024903

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Stephen Edward Fitzgerald
Status: Congressional Candidate
State/District: KSo2

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 10/24/2018
Period Covered: 01/01/2017– 10/19/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AMERICAN ARMED FORCES MUTUAL AID ASSN VALUE ADDED WHOLE LIFE [WU]		\$15,001 - \$50,000	None		
CHECKING/SAVINGS ACCOUNTS ⇒ CITIZENS SAVINGS AND LOAN CHECKING [BA]		\$1,001 - \$15,000	None		
CHECKING/SAVINGS ACCOUNTS ⇒ COUNTRY CLUB BANK CHECKING ACCOUNT [BA]		\$15,001 - \$50,000	None		
CHECKING/SAVINGS ACCOUNTS ⇒ USAA FEDERAL SAVINGS CHECKING [BA]		\$15,001 - \$50,000	None		
ETRADE ⇒ Ford Motor Company (F) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ETRADE ⇒ United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ETRADE ⇒ Werner Enterprises, Inc. (WERN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
FITZGERALD ASSOCIATES LC ⇒ 1746 VILAS ST LEAVENWORTH KS [RP] LOCATION: LEAVENWORTH/LEAVENWORTH, KS, US		\$50,001 - \$100,000	None		
Other Investment Accounts ⇒ CGM MUTUAL FUND [MF]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$1 - \$200
Other Investment Accounts ⇒ FIDELLITY CONTRAFUND [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Other Investment Accounts ⇒ JANUS GLOBAL SELECT FUND D SHARES [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Other Investment Accounts ⇒ OAKMARK FUND INVESTOR CLASS [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Other Investment Accounts ⇒ TEMPLETON DEVELOPING MARKETS [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
SERIES EE SAVINGS BONDS [GS]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$5,001 - \$15,000
Tax Deferred Accounts ⇒ KNIGHT OF COLUMBUS [FN] DESCRIPTION: SPOUSE ROTH		\$1,001 - \$15,000	Tax-Deferred		
Tax Deferred Accounts ⇒ KNIGHTS OF COLUMBUS [FN] DESCRIPTION: STEVE ROTH		\$50,001 - \$100,000	Tax-Deferred		
Tax Deferred Accounts ⇒ KNIGHTS OF COLUMBUS [FN] DESCRIPTION: STEVE TIRA		\$50,001 - \$100,000	Tax-Deferred		
Tax Deferred Accounts ⇒ KNIGHTS OF COLUMBUS [FN] DESCRIPTION: SPOUSE ROTH		\$50,001 - \$100,000	Tax-Deferred		
Tax Deferred Accounts ⇒ Northrop Grumman Corporation (NOC) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Trust Company of Kansas Holdings ⇒ BARON REAL ESTATE INSTITUTIONAL [MF] DESCRIPTION: BARON REAL ESTATE INSTITUTIONAL		\$1 - \$1,000	Dividends	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Trust Company of Kansas Holdings ⇒ BLACKROCK HIGH YIELD BOND CLASS A [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ CASH DEPOSIT ACCOUNT TCK [BA]		\$1 - \$1,000	None		
Trust Company of Kansas Holdings ⇒ COGNIZANT TECHNOLOGY SOL [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Trust Company of Kansas Holdings ⇒ COHEN & STEERS REAL ESTATE SECURITIES [MF]		\$1 - \$1,000	Dividends	\$201 - \$1,000	\$1 - \$200
Trust Company of Kansas Holdings ⇒ FEDERATED GOVT OBLIGATIONS INST FD #5 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ FEDERATED INTERNATIONAL LEADERS I [MF] DESCRIPTION: FEDERATED INTERNATIONAL LEADERS I		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Trust Company of Kansas Holdings ⇒ FEDERATED TOTAL RETURN BOND INST SVC SHS [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ FMI INTERNATIONAL [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ GOLDMAN SACHS INFLATION PROTECTED SEC A [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ JANUS HENDERSON FLEXIBLE BOND I [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Trust Company of Kansas Holdings ⇒ JP MORGAN EQUITY INCOME SELECT FUND [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Trust Company of Kansas Holdings ⇒ MFS INTERNATIONAL VALUE A [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Trust Company of Kansas Holdings ⇒ OAKMARK INTERNATIONAL INST [MF] DESCRIPTION: OAKMARK INTERNATIONAL INST		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Trust Company of Kansas Holdings ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
OPPENHEIMER DEVELOPING MARKETS [MF]					
Trust Company of Kansas Holdings ⇒ OPPENHEIMER INTERNATIONAL SMALL MID CO [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ PIMCO COMMODITIES PLUS STRATEGY FUND A [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ PIMCO SHORT TERM A [MF]		\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ T ROWE BLUE CHIP GROWTH FUND ADVISOR CLASS [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ T ROWE PRICE QM US SMALL-CAP GROWTH EQUITY [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ UNDISCOVERED MANAGER BEHAVIORAL VALUE FUND CI [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Trust Company of Kansas Holdings ⇒ VANGUARD GROWTH INDEX FUND [MF] DESCRIPTION: VANGUARD GROWTH INDEX FUND		\$1 - \$1,000	Dividends	\$1 - \$200	None
Trust Company of Kansas Holdings ⇒ VANGUARD VALUE INDEX FUND [MF] DESCRIPTION: VANGUARD VALUE INDEX FUND		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	None
USAA ⇒ Boston Scientific Corporation (BSX) [ST]		\$1,001 - \$15,000	Dividends	None	None
USAA ⇒ Northrop Grumman Corporation (NOC) [ST]		\$1,001 - \$15,000	Dividends	None	None
USAA ⇒ USAA MONEY MARKET [BA]		\$1,001 - \$15,000	Interest	None	None

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
STATE OF KANSAS	SALARY	\$5,000.00	\$17,456.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	USAA	November 2016	Auto Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<div><div>◦ CHECKING/SAVINGS ACCOUNTS</div><div>LOCATION: US</div><div>◦ ETRADE</div><div>LOCATION: US</div><div>◦ FITZGERALD ASSOCIATES LC</div><div>LOCATION: LEAVENWORTH/LEAVENWORTH, KS, US</div><div>◦ Other Investment Accounts</div><div>LOCATION: US</div><div>◦ Tax Deferred Accounts</div><div>◦ Trust Company of Kansas Holdings</div><div>LOCATION: US</div><div>◦ USAA</div><div>LOCATION: US</div></div>
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EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Stephen Edward Fitzgerald , 10/24/2018